

Ep #129: Moving from Fee Only RIA to the Charitable Giving Dept at a University with Ryan Rasmussen

# NEW PLANNER PODCAST



**Full Episode Transcript**

**With Your Host**

**Caleb Brown**

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## **Ep #129: Moving from Fee Only RIA to the Charitable Giving Dept at a University with Ryan Rasmussen**

Welcome to the *New Planner Podcast*, where it's all about helping you successfully enter the financial planning profession and accelerate your financial planning career.

This podcast will help you understand the profession, become familiar with the various career paths available to you, and avoid the mistakes that limit your success.

Join your host, Caleb Brown, to explore the human side of creating a successful planning career through interviews, personal experience, and insights from the trenches.

Let's get started.

Caleb Brown: Welcome to the 129th episode of the New Planner Podcast, this is Caleb Brown, your host. My guest today is Ryan Rasmussen, a Trust and Estates Coordinator for the University of Georgia.

Ryan stops by to share his story on how he became a financial planner. From how he learned about financial planning, got started in the CFP program and secured a financial planning resident position with a high-profile RIA firm in San Francisco. And what challenges he faced moving across the country to a much higher cost of living area.

Listen in the middle where he shares how he found and secured the highly competitive resident position, what the interview process entailed, and what he learned during his tenure there.

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He also shares why he only completed two years of the three-year residency program. Why he joined a new California firm, then left that firm after a year to return to his hometown in Georgia.

Listen as he discusses why after stints in three very prominent fee-only RIA firms, he decided to pivot and take a position with the University of Georgia.

Listen to the end too where he talks about what he does in his current role, what his career track looks like, and why this pivot has been a good fit for him. Plus some career tips for new planners.

If you're seeking a career path outside in one of the main points of entry into the profession, then this is the episode for you.

Hey Ryan, welcome to the New Planner Podcast.

Ryan Rasmussen: Hey Caleb, thanks for having me, I appreciate it.

Caleb Brown: You bet, been looking forward to this. You know, we go back way back, right? So, you were in my class a long time ago, and you started in an RIA and now you're in a different channel. You're in the university setting, so I thought this would be really interesting episode.

So, as we typically do, maybe just start with how you got started and interested in the financial planning profession and we'll work our way up to your current position.

Ryan Rasmussen: No, that sounds good. I've actually been asked probably hundreds of times how I've gotten into financial planning and funny enough, it's changed quite a bit.

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So, ultimately, I've gotten into financial planning because I honestly didn't know a lot about it growing up. And I got into college, I started being forced into the personal finance realm with student loans and whatnot, and didn't really know what I was doing.

I finally had a reckoning one day where I was like, I need to have a good picture, a good overview of what's going on with my finances. And it was shocking to a certain extent, but I was halfway through my degree and that was my first motivation to really start diving into personal finance.

At the time I was also transferring into the University of Georgia, trying to figure out what major I wanted to do. I had a friend's dad who was a financial advisor who was mentoring me at the time as well. And as I was looking for majors at UGA, I saw financial planning and one thing led to another.

I got into University of Georgia and then I applied to the financial planning program. So, wonderful program, I learned so much. I did a complete 180 on what personal finance was, how to learn more about it, just general like how to think about personal finance as a financial advisor and also, probably how a lot of people outside of being a financial advisor should think about money as well.

So, it was a really great program because it got me a job right away out of school. And then also, I had a great base of knowledge of things that I think everybody should know. So, from there, I got into a residency program with Yeske Buie.

Caleb Brown: Let me stop you there for me because I want to come back. Just something you said earlier, I mean, maybe you're being too hard on yourself.

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It's like dude, anybody that looks at their balance sheet, and their personal financial statement when they're 21-years-old and they're a college dude, it just doesn't look good. So, you're being way too hard on yourself.

Ryan Rasmussen: It wasn't even that really, the interesting thing about that is just like that was ... it was how money was managed in my household. It was pretty generic, at least from my point of view. My dad balanced the checkbook, spent multiple early mornings figuring out the personal finance situation and all of that.

But my mom was in charge of managing student loans for my sister and I, and my dad had views on education, and I think they didn't quite align. So, my mom really helped out with that aspect, but I wasn't really aware of loans that were being taken out.

Of course, you go through the process, and you do the questionnaires, you're like, "Yes, I'm aware of all of this." But once you've done that a few semesters and then you see the sum of it all together, it really makes you think.

I also was like, "I need to get out of college as soon as possible." So, I did the four-year track. I wish I could have done it in three and a half, but four years was what it took me to get out.

Caleb Brown: Got it. So, you graduated in, was it 2017? Is that what you said?

Ryan Rasmussen: May 2017, yep.

Caleb Brown: Okay, and then you mentioned you had a good base of knowledge, which is — yeah, I mean that's one of the best

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things about getting the financial planning major. Even if you don't become a planner, which very few people do that, you know all this stuff for yourself and your own planning.

So, you mentioned the residency program, so talk to us about that.

Ryan Rasmussen: So, I went to FPA Baltimore in, I think that was 2016, the spring or the annual conference. I met Dave and Elisa Buie and from there I did their interview process, a really good interview process. It was pretty substantial.

But yeah, I was really excited about that position because I was told by everybody in the financial planning world, at least in that the registered, the RIA fee-only world that they're a top-notch firm and they're going to teach you a lot about financial planning.

They're going to fast track it, you're going to be able to do stuff that other people may not be able to do, two or three years in to their career. So, I was really excited. The big thing was, I had to fly out to San Francisco, live out there to do the residency, which was great.

I actually did an internship — I do quotes because I didn't do an internship in financial planning program or a position. I actually, went out as an intern with my uncle who owns a construction company in LA. But embarrassingly, I honestly was like, “LA, San Francisco, what's the difference?”

Caleb Brown: Same thing, right?

Ryan Rasmussen: Same thing, I can do this, and just a quick little pivot there. I moved out to San Francisco to start the residency

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program with nothing but summer clothes because I started in July.

Truly the coldest summer I've ever had. I had to get my parents to expedite a shipment of sweaters and pants out. So, it was about three weeks of me freezing.

Caleb Brown: That's a rookie mistake, man, come on now. I'm just making fun because I did the same thing when I was in Oakland a long time ago, and Dave and Elisa are great.

So, Yeske Buie, we actually had Yusuf on an episode one of the podcast a long time ago.

So, the residency, talk about that because that was, and it still is kind of different than what other people are doing. So, maybe just explain the residency and what you were hired for and what you did.

Ryan Rasmussen: So, the residency program's a three-year program, three-year track where basically they have a role mastery sheet. They show you it, they say, "This is exactly what you're going to do."

It was very structured, had a lot of one-on-one time with the lead advisors. I had a lot of opportunities to practice the training modules and things like that, and that was six months.

The first six months was, "We need you to learn and do nothing but learn and then get acclimated to this whole relationship management thing that embodies financial planning, but we also need your technical skills to be up here as soon as possible."

So, it was like going into calculus one or like a refresher for intense or very, very complex math that feeling you get, that

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headache. But it was almost three months of my head felt like it was swelling every time I was going home because I was just learning so much.

But I loved it, even though it was uncomfortable because we were learning so much and we were progressing so quickly. I felt like that six months at Yeske Buie was like the equivalency of being in college for three years or so. I just felt like I was mastering so much.

And at the same time, there's that underlying pressure of you're also managing, people are paying for your service. So, you're going to learn all this stuff, but you're also providing work or you are helping to create work to clients, to households, to families, to people that really depend and really get a lot from these services.

So, it was a lot, it was a huge jump that first six months and the learning continued. It was just after that point, it was like, "Alright, you've mastered the base, now we learn the more complex stuff, but that's going to take a little bit more one-on-one, like fine tuning, how to present yourself in meetings, things like that."

Caleb Brown: It was a three-year program. So, were you there three years?

Ryan Rasmussen: I wasn't there three years. So, I got married in the middle of all that. I had to leave the residency program early because living in San Francisco with two people in one apartment, there was some financial stress there.

Like trying to figure out, "Okay, this residency is temporary," being green thinking like, "Oh, this next thing, this offer that's on the table right now, it's not always going to be there. I want to

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see what it's all about.” People told me, like, “Need to take a look at it.”

So, I went ahead, and I applied somewhere else and it was not a residency position, it was more long-term and that's what I was looking at that time.

I wanted more stability just because after you complete a residency program in San Francisco and you plan to stay in San Francisco, it's a little nerve-wracking, financially, just trying to make sure that you're making that right jump or that right step forward.

Not only to live there, but also just making sure that the experience that I had in financial planning, I wanted to keep building on it, keep growing on it.

Caleb Brown: Well, was that the plan? Because I thought the plan was you go work for us for three years, we've got you ready to work in any RIA firm in the country.

Ryan Rasmussen: I mean, that is the plan. There was some other things as well, and I mean, that residency program is literally why I'm here today. So, it was vigorous. So, there was a lot of hours that went into completing the work and making sure all of all the work that I needed to get done was getting completed.

There was a lot of transition in my life as well. I couldn't spend extra hours on the weekends or after work getting everything that I needed done because I just got married, wife's now in San Francisco, had to do more of a balance there. So, I was struggling at that as well. So, that was kind of the other thought process.

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Caleb Brown: Let's go back to something you said that was interesting. Where did you meet your wife?

Ryan Rasmussen: Oh yeah, no, this is a great story. So, for all the New Planner Recruiting listeners, Caleb and I really do go way back. So, I actually met Faith, my wife, in Caleb's class.

Caleb Brown: I teed you up, I couldn't help myself. It's one of the highlights of my career, getting you guys together.

Ryan Rasmussen: Yep, he's a matchmaker of many trades, not only financial advisors, but yeah.

Caleb Brown: And you're still married, right?

Ryan Rasmussen: Still married, yep, happily married. So, we're doing great, all of it thanks to Caleb, so I'm sure ...

Caleb Brown: Alright, enough, enough. So, you got out of there, it sounded like there was just a lot of changes, some financial pressure, and you then got a job where?

Ryan Rasmussen: So, I went to Abacus Wealth Partners down in ... the office was in San Mateo at the time. So, I went down there.

Caleb Brown: J.D. Bruce, yeah, J.D. Bruce's firm, right?

Ryan Rasmussen: Yeah, J.D. Yep, he's the president. But yeah, I went down, I applied at their San Mateo office, and while I was going through the interview process, the thing that was really calling out to me was this was a very high-net-worth office.

So, I think they specialized in more of the high-net-worth clients in San Francisco, which really, I felt like that's something that I wanted to specialize in, master financial planning for

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households and families, that they weren't classified middle income or higher income, they were ultra-high net.

I wanted to get more experience with that. And then also after talking with the relationship manager there and also the other lead advisors there, they had a really strong emphasis on building sophisticated financial plans.

That was another calling for me. I wanted to be able to get into a financial plan and literally just model anything. And I was like, "I think this is where I need to be at." So, I started working at Abacus Wealth Partners and it was a really great experience for sure. I got to work with J.D. Bruce, he's incredible.

Caleb Brown: So, you were still in San Francisco Bay area though, because I mean San Mateo, right?

Ryan Rasmussen: Yeah, so I spent half of the year up still up in San Francisco and then we did move down to San Mateo as well.

Caleb Brown: Okay, well I guess I'm confused. I'm sorry. I thought you got out of California because it was expensive.

Ryan Rasmussen: Oh yeah, no. San Mateo, I'd get up earlier than I usually would, but I would go down to Caltrain. So, I'd ride near the giant stadium, I'd bike along the waterfront every day.

And then I would take a train down to San Mateo, which took about maybe 30 minutes. And then I would get off there and I would go work my day there and then I would head back home.

So, it was a little bit more of a commute when I was living in San Francisco, but we ultimately did move down to San Mateo. No, we actually moved down to Redwood City, which is about 10 minutes away from San Mateo.

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Caleb Brown: And how long did you stay there?

Ryan Rasmussen: So, I actually only stayed there for a year. I had a really good experience there as well. I really liked all my colleagues, they were a much bigger firm than Yeske Buie, but ultimately, it came down where I had to make decisions on if I wanted to stay in San Francisco also, that was during the time with COVID-19.

So, things were just kind of all over the place. We ultimately, decided that we wanted to come back to Georgia. So, we moved back to Georgia, and I was actually in the middle of applying and going through that interview process with Elwood & Goetz as well at that time.

Caleb Brown: Okay. So, you got out of California, you came back to Georgia because that's where you both are from (you and Faith, your spouse), and you got hired at Elwood & Goetz. So, talk to us about that experience.

Ryan Rasmussen: So, one of the firm owners is Joe Goetz, and he was another professor of mine at the University of Georgia. And Joe and I, we stayed connected as I worked in California. So, every year or so we'd touch base on LinkedIn or something like that.

And he was always like, "Hey, let me know when you're ready to move back to Georgia." And I was just like, "Yeah, I'll let you know," and I finally made it happen. So, I did reach out to Joe, and I went through their interview process and it was great.

The good thing about all of these firms, one of the connecting things about all of them is they had a very thorough interview process. So, you've got to learn a lot about the firm before joining and everything.

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Caleb Brown: Well, it seems like a lot of work, why did you go through that? Why didn't you just say, "Screw this, I'm not putting forth all this effort. I'll go interview somewhere else where I don't have to go through all this work."

Ryan Rasmussen: Well, I actually was a part of the interview process with other residents at Yeske Buie and I learned how important it was to hire slow. You ask her questions, you identify what they're all about, and they're doing the same for you.

You have the opportunity — I mean, of course you're being offered the position, but you have the opportunity at that time to make a decision. Was the interview process ... did I feel good about it? Do I think that I can grow here? You make that decision at that point.

Caleb Brown: Okay, so you have three years of experience at this point. You joined Elwood & Goetz. As a senior financial planner, what was your role and what were you doing there?

Ryan Rasmussen: So, this was the smallest firm I worked with, so that's kind of an important thing to note with all of these.

I worked, in my opinion with all the various sizes of register investment advisor, fee-only advisors. I worked with a medium size firm, which was Yeske Buie, and then I went to that large Abacus Wealth Partner company, which I think at the time, there were only 60 employees, but man, that was huge.

So, yeah, went there, had different offices, different specialists, all these different people that were leading different specialized parts of the planning practice, like investment committees, planning committees.

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And then now, I'm at Elwood & Goetz. Elwood & Goetz was much smaller than all the other firms which was really good. I mean, that was exactly where I needed to be for the next step in my career trajectory.

I've learned all these things, but I've kind of been taking a more passive approach in all the meetings I have. I've been speaking up with paperwork items, I've been presenting some lower, easier portions of meetings.

But Elwood & Goetz, was essentially, that was the firm that once I got into it, I hit the ground running and I had large speaking roles, they were pushing me outside of my comfort zone. I was learning how to not seem so green in meetings, getting the reps, becoming a veteran.

Not really, I don't think anybody is ... if you're talking to clients for 20 years, maybe you're a veteran, but getting more comfortable having those complex conversations, realizing these families you're working with, you got to meet them where they're at, where their knowledge base is at, what they've learned about personal finance from at that time in their lives and trying to work with that.

So, it was a lot of talking in client meetings, setting up for client meetings. But they were a smaller firm, so a lot of the things, we just ran with it. I got client requests for I need to make this decision, so I got into my spreadsheet and started trying to help map out that decision and what would be the best course of action. So, a lot of that.

Caleb Brown: Yeah, okay, got it. And you were there a little over two years, so why'd you leave?

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Ryan Rasmussen: I was there for two years, and I was talking at a lot of meetings. I was actually, near the end, I was leading quite a bit of meetings and at the time, I was experiencing just a lot of stress. I think what nobody really told me with financial planning is when you're in financial planning, the burnout rate is real.

When you come in and you have ... I'm not going to say an obscene number, but you have 20 to 30 emails and those are just client questions, and half of those are probably just like, "Hey, we need some money," but the other half is this, "These things happened in my life. My life's blowing up or this incredible thing's happening in my life, but now I need to redo my plan."

It was a lot. I think there was a couple of weeks and months where I had too many, four or five meetings or six or seven meetings — maybe it was four to six meetings in one week. May not be a lot, but for me, it was a lot.

It was a lot of, okay, we've just finished up with this meeting, now we got to record the notes. Oh, we got another meeting in an hour. Oh, and by the way, next week, we got six more meetings that we're going to have to finish up all the preparation for.

So, there's a lot of managing, a lot of different hats. Got to do paperwork, now we got to do this meeting, now we got to implement, trades are a whole other thing, client requests, transactions, things like that.

Just a lot of that for a while just got to me and got me really stressed out at a certain point. And then I was at the point where I was really getting pushed to start leading client meetings and I think at that time, I was just like I don't know if this is really what I need to be doing.

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And I've been doing this for a few years and I'm still not feeling very good with this pace and what I actually do, which is do finance complains, have conversations with clients, things like that.

So, I eventually, I transitioned from Elwood & Goetz and now, I'm at the University of Georgia. So, I'm currently a Trust and Estates Coordinator with the University of Georgia.

So, the best thing about this job — when I was interviewing and everything like that, I was assured that I was going to use a bulk of what I've learned in my career thus far, I would be able to use it.

And I've been here actually exactly a year as of yesterday, and I can say I do a lot of financial planning research still. I do a lot of coaching and my title now is Trust and Estates Coordinator, I think I may have said that, but I kind of went off on a tangent.

Caleb Brown: And what are you doing? What is that role?

Ryan Rasmussen: This role, it's two folds, we view our donor. So, in my position, donors and also development officers are my clients.

So, if a fundraiser development officer has a question about strategic giving or estate donor's giving within their estate in a strategic manner, it's my job to go through the various different options and help identify the options that would be best for that donor.

Of course, everything then gets sent over to their estate planning attorney or their tax professionals. But we have a good understanding of those strategies so we can have those discussions with our donors. But I predominantly provide the



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resources for our development officers so they can go out and have those discussions with their donors.

And then my other colleagues in my office, they typically go into the donor meetings when things get very complex and when the estate planning attorney's also on the phone and things like that, they help clarify everything and they help just to make sure everything doesn't get too complex.

Because I mean, like a lot of people that are probably listening to this, you can go a hundred different ways, and depending on who the donors allied professional is, whether it be in the estate attorney, a financial advisor or a tax professional, they're going to have what they think's the best.

And then we're probably going to go into the meeting with what we've heard from the donor and propose what we think is the best as well. And then of course, it's up to the professional to decide the way going forward.

But be surprised the amount of proposals that we've had and the allied professionals were like, "No, you have a great point, we need to take that consideration." So, that's one aspect of what I do.

And then I do a lot of — when we book plain gifts. So, the big thing I realized as an advisor with where I'm at now is you get that request, I want to update my retirement beneficiaries to X and then you go ahead and do it and you just kind of leave it at that.

Well, I learned while I was working as a financial advisor, I had requests for — people wanted to update their beneficiaries as a charity. And I was like, "Okay, we're going to do it." I did it, sent the paperwork out, and then we were done.

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What I've learned in this position is you really can go further past that. You can try and make an endowment with that gift; you can do planning with the charity before your client passes away so they can really build on what they want to accomplish with that charity.

So, I help facilitate on the backend with the charity on specifically the University of Georgia, just exactly like how we record the gift and make sure that when it comes for our donor and the client to pass away, I make sure that everything goes as planned. So, I help facilitate that.

Caleb Brown: Seems like you went from more of a generalist to a specialist. So, you're in the gifting estate tax sort of charity realm, you've become a subject matter expert in that. What's the career track? I mean, is there somewhere for you to go or are you just here?

Ryan Rasmussen: So, Trust and Estates Coordinator is essentially the bottom of the track, and then the next one up is an associate.

Essentially, the way my office works is my boss, he's the Senior Director. He, you know, typically the larger gifts. He's going to go in and he's going to build rapport with those donors and provide expertise.

The Associate Director, which is the tier right behind my boss, that role is the medium to smaller gifts and he's building up his book or he's building up those relationships, and then I'm right below that.

So, to your point, the way that all of this worked was the old boss, he found a different position at another charity and then everybody moved up, and then the Trust and Estates Coordinator position became open. So, there is a path there.

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Caleb Brown: Got it, I just want to explore that further. I mean, usually when people get these university gigs, they don't ever leave, So, what does that mean for you?

Ryan Rasmussen: You're right, nobody leaves, but people do get promotions, or they find other jobs within the university, so things open up.

The other thing is I am extremely lucky to work with a boss that says, "Hey, if you find something else and you want to go for it, I'm going to be nothing but supportive."

Caleb Brown: That's great.

Ryan Rasmussen: He's like, "I'm going to do nothing but help you as well." But yes, to your point, there's two trajectories. I stay in the gift and estate planning office at the University of Georgia, learn the various different estate planning topics and taxation topics.

I prove myself that I'm competent, I can be in these donor meetings, and then I'll be basically teed up for that promotion.

Or if I want to go a different track, to your point, when people get university jobs like this, they stay here forever, but people are moving around within the university, so other fundraising jobs open up as well.

Caleb Brown: Is it fair to say that this compared to the other RIA firms at slower pace and maybe less pressure?

Ryan Rasmussen: Yeah, I think it is. I think when you're managing people's livelihoods and you're trying to help them make decisions, and you have that heightened level of liability and — I felt a lot of the times as a financial advisor that I'm making the right recommendations, but then you kind of second guess yourself just because the world is so vast with giving advice.

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So, there's that little voice in the back of your head that's like, "No, but what if there's something that you don't know about?" There was a lot of that.

I mean, after spending five years in financial planning, I can say that I was getting to the point where I was learning a ton, but I realized that there was a lot more to be learned as well.

Caleb Brown: And I mean, I'm just curious on how the pay worked there. How does it compare to the independent RIA space now that maybe the pressure's lower or the volume's lower? I mean, is it ...

Ryan Rasmussen: Well, what I found was the experience that I got at financial planning was incredible, and I was able to use that coming to the University of Georgia, in my role now is as a specialist. Also, having the CFP that really helped me as well.

But I mean essentially, so as financial advisor for all the firms that I worked with, I had a base salary with ... most of my firms offered a bonus. So, that was what I was used to.

With the University of Georgia, you get just a base salary, so no bonus there. But all in all, I took a pretty much a step over with comps from where I was at to where I am now.

Caleb Brown: Okay, so you didn't have to come back too much, it sounds like.

Ryan Rasmussen: Yeah. No, no, no. And that was one of the reasons. I mean I do consider myself, I do belong here, but I also, to your earlier point, these university jobs don't open up every day.

So, I saw this position open up, and I knew that this position opens up maybe once every five years, so I need to really take

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this into consideration. And then I was pleasantly surprised with the comps as well as I was going through the interview process.

Caleb Brown: Glad you have a great fit, Ryan, that's good news. Well, any final tips or anything you want to leave the New Planner audience with?

Ryan Rasmussen: Get into it because you want to help people, you want to help families, you want to help alleviate stress in people's lives, you will do that as a financial advisor, and just learn, keep learning.

Also force yourself to push yourself outside of your comfort zone. In many people's cases, it helps them grow and it also helped me grow, but it's also going to help you determine what you like and what you don't like, so you can have a better sense of that.

Financial planning honestly, is the best decision I could have made in school. Best way to start my career and I'm lucky enough to still be able to specialize in financial planning concepts by taking a little bit of a separate route.

Caleb Brown: Great story. Ryan, thanks for coming on.

Ryan Rasmussen: Thank you.

Thanks for joining us for this episode of the New Planner Podcast. If you are ready to discover the top career paths for financial planners and see which track is best for you, we created a free guide to help you.

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Tune back in next week for another episode, and until then, we are here to help you succeed.